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COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 15.4.2008
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COMMISSION STAFF WORKING DOCUMENT

Accompanying document to the

Report on Progress in Creating the Internal Gas and Electricity Market

[COM(2008) 192 final]

COMMISSION STAFF WORKING DOCUMENT

Accompanying document to the

Report on Progress in Creating the Internal Gas and Electricity Market

BACKGROUND TO THIS REPORT

This summary technical report contains important background information relevant to the main 2007 Communication on the implementation of the electricity and gas Directives¹. The bulk of the information is based on the reports made by national regulators, which were submitted in the second half of 2007. These individual reports have been published and can be found on the website of the European Regulators' Group for Electricity and Gas (www.ergeg.org).

This report consists of comparative tables and graphs which, as in previous benchmarking exercises, draw together key indicators submitted by regulators unless indicated differently.

The tables reflect the situation as indicated for each table/graph. The majority of data refers to the position by end of 2006, in those cases where the full opening of the electricity and gas market as of 1 July 2007 has a special indication on the market situation data refers to July 2007 as far as available already. Where no 2006 or very recent 2007 data is available 2005 data has been added, if available, with a view to allow for comparisons on a very general scale. Where no data is currently unavailable, this appears in tables as follows: "NA" (not available) or in the case the data is not applicable for the abbreviation: "NAP" (not applicable).

¹ 2003/54/EC and 2003/55/EC

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1. LEGAL IMPLEMENTATION

Table 1: Market opening

Electricity and gas markets opened before 1 July 2007	Electricity and gas markets open on 1 July 2007	Derogations
Austria	Bulgaria	On electricity market opening
Belgium	France	Cyprus until 2013
Czech Republic	Greece	Estonia
Denmark	Hungary	Malta
Finland (electricity only)	Luxembourg	
Germany	Northern Ireland	On gas market opening
Italy (gas only)	Poland	Finland
Ireland	Romania	Latvia until 2010
The Netherlands	Slovenia	Lithuania until 2010
Portugal	Slovakia	Portugal until 2010
Spain	Electricity market open on 1 July 2007	N.B. Cyprus and Malta have no gas market for the time being
Sweden (electricity only)	Italy	
United Kingdom	Latvia	
	Lithuania	
	Gas market open on 1st of July 2007	
	Estonia	
	Sweden	

Source: European Commission

2. CUSTOMER DIMENSION

Table 2: Annual Switching Rate Electricity 2006 (by volume) ²

	large industrial	medium industrial businesses sized and	small industry and households	Market opening
Austria³	6,4%	1,6%	0,9%	100%
Belgium	NA	NA	NA	100%
Bulgaria	NA	NA	NA	100%
Cyprus⁴	0%	0%	NA	30,2% (est.)
Czech Rep.	4%	2%	0,2%	100%
Denmark⁵	NA	15,2%	2,7% ⁶	100%
Estonia	NA	0%	0%	13%
Finland	NA	NA	NA	100%
France⁷	0%	0%	0%	69% [*]
Germany	14,15% ⁸	9,33% ⁹	2,55% ¹⁰	100%
Greece	NA	NA	0%	70% [*]
Hungary	NA	NA	NA	67% [*]
Ireland	NA	NA	NA	100%
Italy	NA	NA	NA	73% [*]
Latvia	NA	NA	NA	NAP
Lithuania	NA	0%	0%	NAP

² Not including rate of customer re-negotiations with their existing supplier. Figures about contract re-negotiations are only available for Germany (2005: 11, 96%; 2006: 11, 86%) and Belgium (2005: 6,4 %)

³ Switching rates from Oct 2006 to Sept 2007.

⁴ Derogation. No switching procedures are as yet into force because there are no IPPs (the switching procedure/changing supplier is not an option at the moment).

⁵ No data available specifically for large industry. Statistic on switching focuses on 2 customer segments: hourly metered customers and non-hourly metered customers ("load profile" = "template customers").

⁶ Non-hourly metered customers ("load profile" = "template" customers).

⁷ Data not available by volume: switching rate by number of eligible meter points – large industry: 0,21%; medium sized industry: 0,02%; small industry and households: 0,22%.

⁸ Consumption of more than 2 GWh/year.

⁹ Consumption of more than 10 MWh/year to 2 GWh/year.

¹⁰ Consumption of 10 MWh/year or less.

Luxembourg	10,9%	0,7%	0%	84%
Malta	NA	NA	NA	0% ¹¹
Netherlands	NA	NA	NA	100%
Norway	NA	NA	NA	100%
Poland	15,84%	0,01%	0%	80% [*]
Portugal¹²	5,5%	55,7%	4,1%	100%
Romania	NA	NA	NAP	83,5% [*]
Slovakia	NA	NA	0%	80% [*]
Slovenia	0%	1,18%	1,46% ¹³	75% [*]
Spain	9%	20%	5%	100%
Sweden¹⁴	9,6%		9,8%	100%
UK	NA	NA	NA	100%

Source: Regulators data

Note: countries marked with [*] - market opening as of 1 .7.2007: 100%

¹¹ Derogation.

¹² Switching rate calculated as ratio between variation of electricity supplied in the liberalised market to the total annual consumption.

¹³ 1, 95% total eligible customers at distribution level (households excluded) including medium and small sized industry.

¹⁴ Sweden switching rate statistics are divided in two groups: households and non-households costumers. The figures for the categories "industrial" and "medium sized industrial and businesses" together refer to annual switching rate for non-household customers; category "small industry and households" refers to annual switching rate for household customers.

Table 3: Annual Switching Rate Gas 2006 (by volume)¹⁵

	large industry and power plants	Medium sized industry and business	small industry and household	Market opening
Austria	6%	2,7%	NA	100%
Belgium	NA	NA	NA	100%
Bulgaria	NA	NA		100%
Cyprus¹⁶	NAP	NAP	NA	NAP
Czech Rep.	NA	NA	NAP	69,2%[*]
Denmark	NA	NA	13%	100%
Estonia	0%	0%	0%	95% [*]
Finland	NAP	NAP	NAP	0%
France	NA	NA	NA	73% [*]
Germany	2,82%	0,41%	0,01%	100%
Greece	0%	0%	0%	70%
Hungary	86%	40%	1%	100%
Ireland	NA	NA	NA	86%
Italy	7%	4%	NA	100%
Latvia¹⁷	0%	0%	0%	0%
Lithuania¹⁸	NA	0%	0%	81% [*]
Luxembourg	0%	0%	0%	79% [*]
Malta¹⁹	NAP	NAP	NAP	NAP
Netherlands	NA	NA	NA	100%
Norway	NA	NAP	NAP	NAP

¹⁵ Not including rate of customer re-negotiations with their existing supplier. Figures about contract re-negotiations are only available for Germany (2005: 9, 44%; 2006: 7%).

¹⁶ No developed gas market.

¹⁷ Derogation until 2010.

¹⁸ Derogation until 2010.

¹⁹ No developed gas market.

Poland	NA	NA	0%	71,22% [*]
Portugal²⁰	NAP	NAP	NAP	NAP
Romania	NA	NA	NA	75% [*]
Slovakia	NA	NA	0%	72% [*]
Slovenia	NA	NA	NA	89,40% [*]
Spain	25%	25%	NA	100%
Sweden	NA	NA	NA	100%
UK	NA	NA	NA	100%

Source: Regulators data

Note: countries marked with [*] - market opening as of 1 .7.2007: 100%

²⁰ Derogation until 2010.

Table 4: Existence of price controls 2006

	ELECTRICITY			GAS		
	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households
Austria	N	N	N	N	N	N
Belgium	N	N	Y	N	N	Y
Cyprus	Y	Y	Y			
Czech Rep.	N	N	Y	N	Y	Y
Denmark	Y	Y	Y	Y	Y	Y
Estonia	Y	Y	Y	N	N	Y
Finland	N	N	Y			
France	Y	Y	Y	Y	Y	Y
Germany	N	Y	Y	N	N	N
Greece	Y	Y	Y			
Hungary	Y	Y	Y	Y	Y	Y
Ireland	Y	Y	Y	Y	Y	Y
Italy	Y	Y	Y	N	N	Y
Latvia	Y	Y	Y	Y	Y	Y
Lithuania	Y	Y	Y	N	Y	Y
Luxembourg	N	N	Y	N	N	N
Malta	Y	Y	Y			
Netherlands	N	N	N	N	N	N
Norway	N	N	N			
Poland	Y	Y	Y	Y	Y	Y
Portugal	Y	Y	Y			
Slovakia	N	N	Y	N	N	Y
Slovenia	N	N	Y	N	Y	Y

Spain	Y	Y	Y	Y	Y	Y
Sweden	N	N	N	N	N	N
UK	N	N	N	N	N	N

Source: ERGEG

3. ELECTRICITY MARKET INDICIATORS

Table 5: Degree of concentration 2006

	Electricity (generation)
Very highly concentrated [HHI ²¹ above 5000]	BE, FR, IE, LV, SK, SL
Highly concentrated [HHI 1800-5000]	ES, IT, LT, NL, HU, LX, PT, ROM
Moderately concentrated [HHI 750-1800]	AT, CY, NO, PL, UK, SW

Source: regulators' submissions (NA: FI, DK, CZ, GR, ML, EE, DE)

²¹ HHI by capacity – sum of squared shares of individual companies.

Table 6: Wholesale Market Position – 2006

	Annual demand (TWh) ²²	Number of companies with more than 5% share of production capacity	Share of largest 3 generators (%)	Spot trading / total electricity consumption (% - in TWh)	Future trading/ total electricity consumption (% - in TWh)
Austria	58,88	5 [5] ²³	52,2	1,67	NA
Belgium	NA [2005: 87,08]	2	87.64	NA [2005: 0]	NA [2005: 0]
Bulgaria	NA	NA	59.77	NA	NA
Cyprus	4,65	1 [1]	100	NAP	NAP
Czech Rep.	71,7	1 [1]	69.4 [73,92]	0,5	NAP
Denmark	35,8	2 [2]	66 [76]	34,4	61
Estonia	7,98	2 [1]	94[99]	0	0
Finland	NA [2005: 84,9]	5	57	NA [2005: 39,2]	NA [2005:41,7]
France	478,4	1 [1]	86 [93]	29,6	83,1
Germany	567	5 ²⁴	68,52	88,46	386,77
Greece	54,6	1 [1]	95.3	NAP	NAP
Hungary	40,55	6 [6]	67 [67]	NA	NA
Ireland	26,6	4 [4] ²⁵	83.16 [72]	NAP	NAP
Italy	337,8	5	74.3	189	NAP
Latvia	NA [2005: 6,5]	1	92	NA [2005: 0]	NA [2005: 0]

²² Annual final demand including losses without pumped storage

²³ Energieallianz and VERbund are perceived as separate entities.

²⁴ Companies' net generation capacity in relation to net capacity for "public supply", source: IWEN.

²⁵ Numbers relate to fully dispatched generation; excluding interconnection capacity

Lithuania	8,9	3 [3]	71.6	1,68	NA
Luxembourg	6,72	2	73	0	0
Malta	NA	1	100	NA	NA
Netherlands	112	4 [4]	60	19,2	131,1
Norway	122,5	5	43,7	66,3	399,9
Poland	149,8	5	37.7	0,19	0
Portugal	49,2	2 [3]	67.3 [75]	NAP	0,46
Romania	50,02	6	74.22	4,106	NAP
Slovakia	26,6	2[1]	83,75 [85,2]	0	0
Slovenia	13,69	2	90.6	0,001	0
Spain	268	4	80	139,1	NA
Sweden	157,6	3	79	110,8	235
UK	305,4	6 [6]	37,5 [37] 59.9	NA	NA

Sources: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 7: Retail Market position – 2006

	Companies with market share over 5%	Number of fully independent suppliers (no network affiliates) ²⁶	Market share of largest 3 companies large industrial users (%)	Market share of largest 3 companies /medium seized industry (%)	Market share of largest 3 companies small commercial/house hold (%)
Austria	8 [7]	3	50 (est.)	50 (est.)	50 (est.)
Belgium	3	NA	NA	NA	NA
Bulgaria	9	NA	NA		
Cyprus	1 [1]	0	100	100 [100]	100 [100]
Czech Rep.	3 [3]	285 [279]	96 [96]	98 [98]	99 [99]
Denmark	8 [8]	5 [5]	NA		
Estonia	1 [1]	3 [3]	100 [100]	92 [92]	92 [92]
Finland	3	NA	NA		
France	1	17 [17]	93,7 [93,6]	98,2 [98,3]	95,6 [95,5]
Germany	3	NA	48,49 ²⁷	36,07	47,04
Greece	1	24	97,5	98,5	100
Hungary	4 [4]	11 [12]	71,05 [65,73] ²⁸	99,43 [99,65]	100 [100]
Ireland	5	NA	NA		
Italy	3	213	48,7	33,7	91,3
Latvia	1	NA	NA	NA	NA
Lithuania	2[1]	17 [18]	100 [100]	100 [100]	100 [100]
Luxembourg	4	2	92	96	97

²⁶ Number of independent suppliers that are ownership unbundled of any electricity network business in the country

²⁷ Consumption of more than 10 MWh/y to 2 GWh/y.

²⁸ 50-2000 MWh/y.

Malta	1	NA	NA		
Netherlands	5 [4]	20 [20]	NA	NA	80 [83]
Norway	5	5 ²⁹	NA		
Poland	6	21	47,5	51,5	48,2
Portugal	1	3 [3]	100 [100]	98,6 [98,6]	98,6 [98,6]
Romania	9	140	44	41	59
Slovakia	5[3]	140	14	1	20
Slovenia	6	8	88	80	75
Spain	4	12	85	84	82
Sweden	3	10 [11] (est.	43	43	43
UK	7[6]	16 [17]	55 [54] ³⁰	56 [55]	58-

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available.

²⁹ Household market

³⁰ Figures referring to non-domestic with a consumption less than 100 kW; for recent 2007 data: November 2006-February 2007

4. GAS MARKET INDICIATORS

Table 8: Degree of concentration

	Gas (import and production)
Very highly concentrated [HHI above 5000]	all others
Highly concentrated [HHI 1800-5000]	AT, IE, IT, ES, NL
Moderately concentrated [HHI 750-1800]	UK

Source: Commission

Table 9: Market Structure in Import and Production of Gas – 2006

	Gross inland consumption (Gm3/y) ³¹	Number of companies with over 5% share of production\import capacity	Number of companies with over 5% share of available gas	Share of 3 largest gas shippers in wholesale market (%)
Austria	8,46	3[4]	4 [4]	80 [80]
Belgium	NA [2005: 17,1]	3 [2005: 2]	NA [2005: 2]	NA [2005:100]
Bulgaria	NA	3	NA	NA
Cyprus	NAP	NAP	NAP	NAP
Czech Rep.	9,27	1 [1]	1 [1]	100 [100]
Denmark	4,1	1 [7]	3 [3]	90 [90]
Estonia	1.0087	2 [2]	2 [2]	100 [100]
Finland	4,5	1 [1]	1 [1]	100 [100]
France	46,77	3[2]	2 [0]	NA
Germany	105,2	7 [2005: 5]	NA [2005: 11]	NA
Greece	3,12	1 [1]	1 [1]	100 [100]
Hungary	14,742	3 [2]	4 [4]	89,9 [92]
Ireland	NA	6	NA	NA
Italy	84,5	3	3	66,5
Latvia	NA [2005: 1,66]	1 [2005: 1]	NA [2005: 1]	NA [2005:0]
Lithuania	3,10	4 [2]	2	100 [100]
Luxembourg	1,407	1	1	100
Malta	NAP	NAP	NA	NAP
Netherlands	45	4 [4]	4 [4]	NA
Norway	NA	NA	NA	NA

³¹ Gross Inland Consumption = production + imports – exports + Storage variations

Poland	13,9	1 [1]	1 [1]	99,3
Portugal	3,86	1 [1]	1 [1]	NAP
Romania	17,2	4	4	90,6
Slovakia	6,2	1 [1]	1 [1]	100 [100]
Slovenia	1,1	1 [1]	1 [1]	86
Spain	33,8	5 [6]	4 [4]	75,4
Sweden	0,9	1 ³²	5	NA [2005:100]
UK	98	6[10]	NA	NA [2005:42]

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

³² Importers

Table 10: Structure of Gas supply market 2006

	Companies with market share over 5% in retail	Number of fully independent suppliers ³³	Market share of largest 3 companies power plants (%)	Market share of largest 3 companies large industrial users (%)	Market share of largest 3 companies small/medium business (%)	Market share of largest 3 companies very small commercial /household (%)
Austria	4 [5]	5 [5]	NA	NA	NA	NA
Belgium	5 [2005:2]	NA [2005:4]	NA [2005: 100]	NA [2005: 100]	NA	NA
Bulgaria	2	NA	NA	NA	NA	NA
Cyprus	NAP	NAP	NAP	NAP	NAP	NAP
CZ	7 [7]	3 [3]	NA	57,84	57,59	57,48
Denmark	6 [4]	3 [3]	100 [100]	NA	85 [85]	95 [95]
Estonia	1 [1]	0 [0]	100 [100]	100 [100]	100 [100]	97 [93]
Finland	1 [6]	0 [0]	100 [100]	100 [100]	NA	NA
France	3 [4]	15 [15]	NA	86 [84]	93 [93]	100 [100]
Germany	4	NA [2005:3]	39	45,5	23,6	27,1
Greece	1 [1]	0 [0]	100 [100]	100 [100]	100 [100]	100 [100]
Hungary	7 [7]	0 [0]	92 [92]	78 [80]	7 [77]	81 [81]
Ireland	3 [3]	7 [7]	99 [99]	91 [91]	100 [100]	100 [100]
Italy	2	182	89,7	71,1	47,3	47,1
Latvia	1 [2005:1]	NA [2005:0]	NA [2005:40]	NA [2005:8]	NA [2005:0]	NA [2005:7,5]
Lithuania	1 [2]	2 [2]	100 [100]	100 [100]	100 [100]	100 [100]

³³

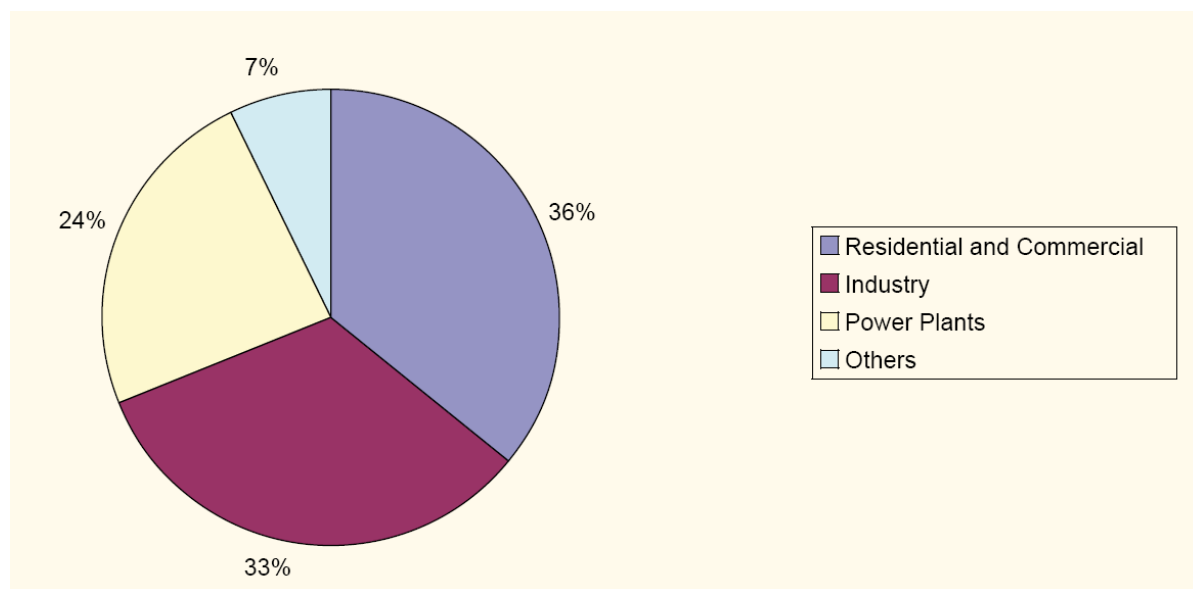
Fully independent suppliers ownership unbundled of any gas network business in the country.

LUX	4	1	95	100	95	92
Malta	NAP	NAP	NAP	NAP	NAP	NAP
NL	6 [3]	20 [20]	NA	NA	NA	79 [80]
Norway	NA	NA	NA	NA	NA	NA
Poland	7 [1]	71 [75]	98,18	96,44	59,39	61,83
Portugal	4 [0]	0 [0]	100 [100]	100 [100]	82 [82]	82 [82]
Romania	6 [4]	11 [11]	75,42	67,57	92,99	95,28
Slovakia	1 [1]	0 [0]	100 [100]	100 [100]	100 [100]	100 [100]
Slovenia	3	0 [0]	1	97	56	66
Spain	5 [5]	19 [21]	74 [74]	74 [74]	74 [74]	87 [87]
Sweden	5	0	NA	NA	NA	NA
UK	7 [6]	27 [28]	NA	52 [54]	61 [60]	73 [72]

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

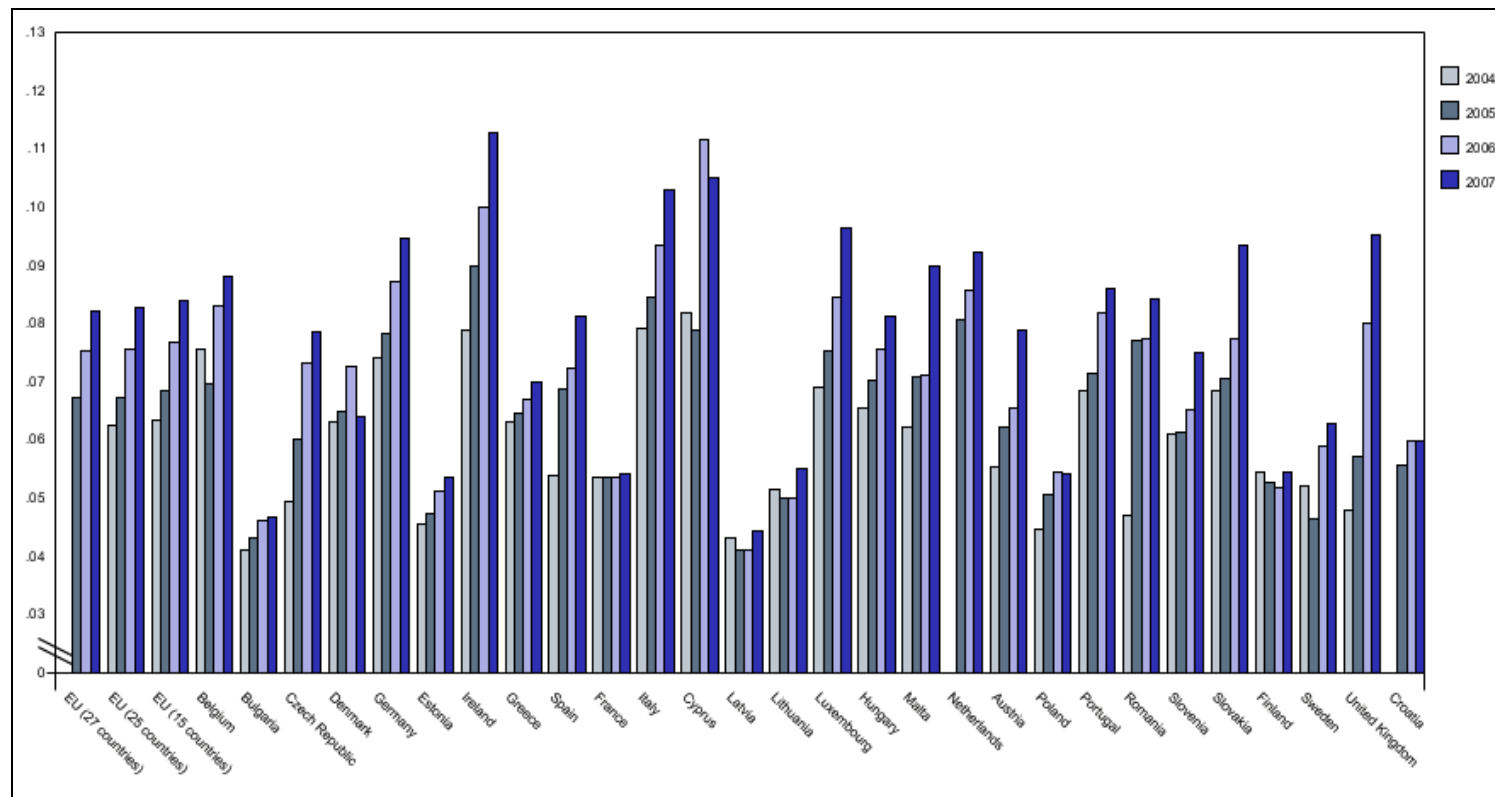
Figure 1: Natural gas shares by sector 2006



Source: Eurogas

5. PRICE DEVELOPMENTS

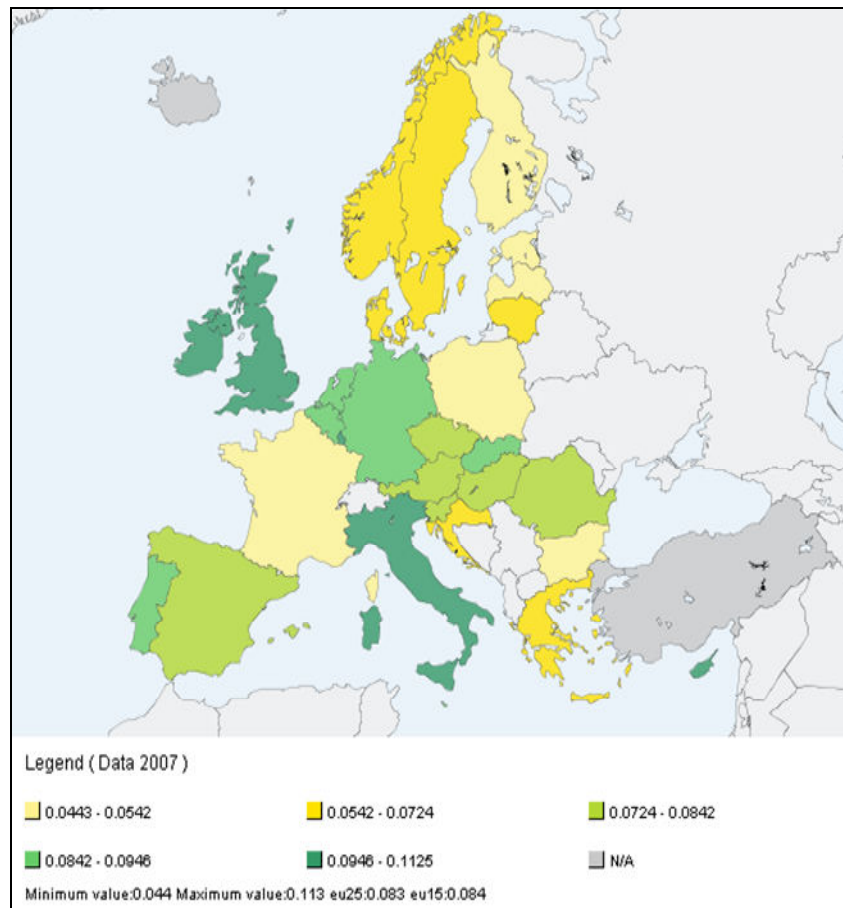
Figure 2: EU Electricity Price 2004-2007 (Industrial Users)³⁴



Source: Eurostat - € per kWh

³⁴ Electricity prices charged to final industrial consumers, which are defined as follows: annual consumption of 2 000 MWh, maximum demand of 500 kW and annual load of 4 000 hours. Prices are given in Euro (without taxes) per kWh corresponding to prices applicable on 1 January each year.

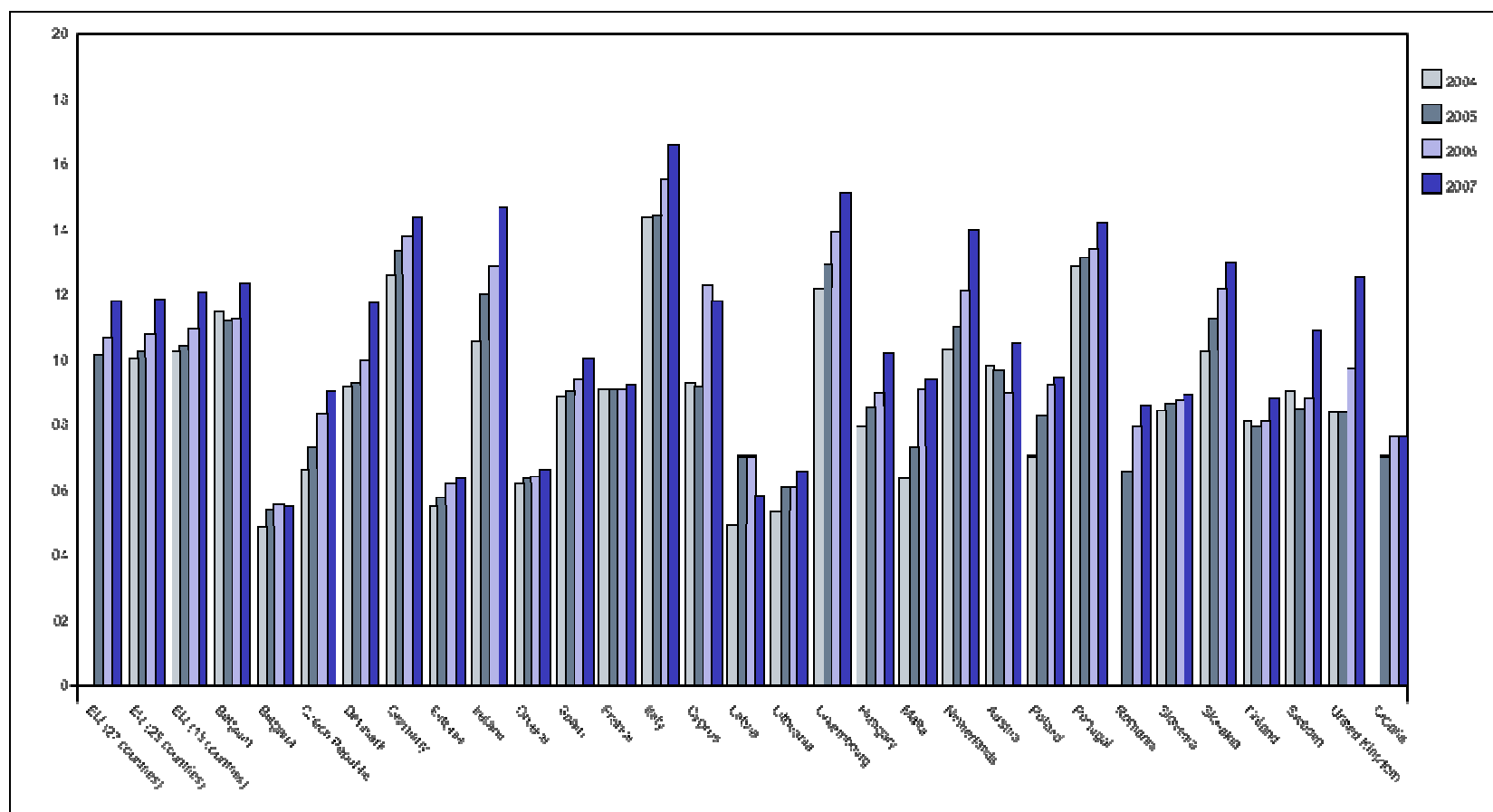
Figure 3: Electricity prices - industrial users - Euro per kWh - 2007³⁵



Source: Eurostat

³⁵ Electricity prices charged to final industrial consumers, which are defined as follows: annual consumption of 2 000 MWh, maximum demand of 500 kW and annual load of 4 000 hours. Prices are given in Euro (without taxes) per kWh corresponding to prices applicable on 1 January each year.

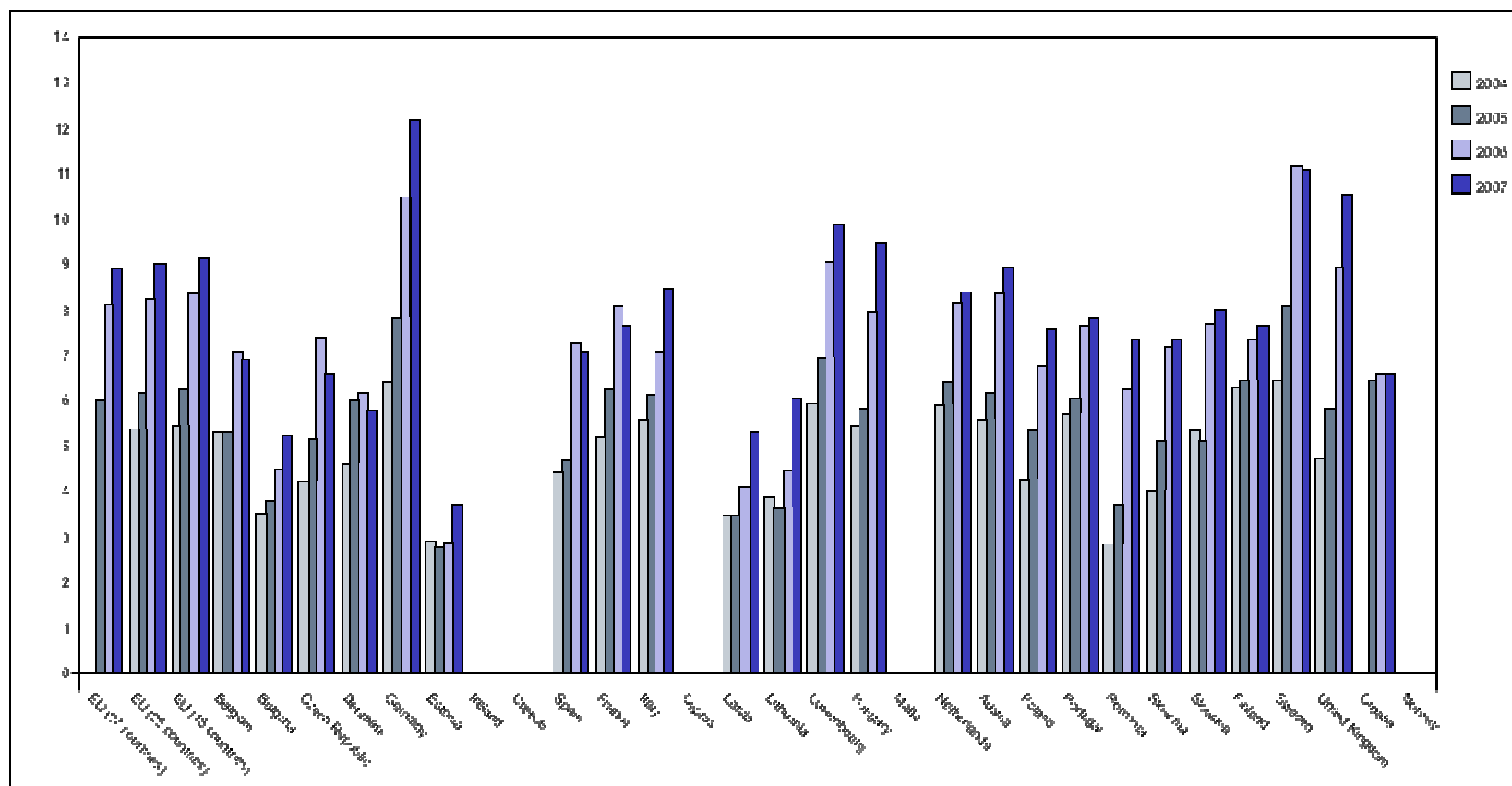
Figure 4: EU Electricity Price 2004-2007 (Household Users)³⁶



Source: Eurostat - € per kWh

³⁶ Electricity prices charged to final domestic consumers, which are defined as follows: annual consumption of 3 500 kWh of which 1 300 kWh is overnight (standard dwelling of 90m²). Prices are given in Euro (without taxes) per kWh corresponding to prices applicable on 1 January each year.

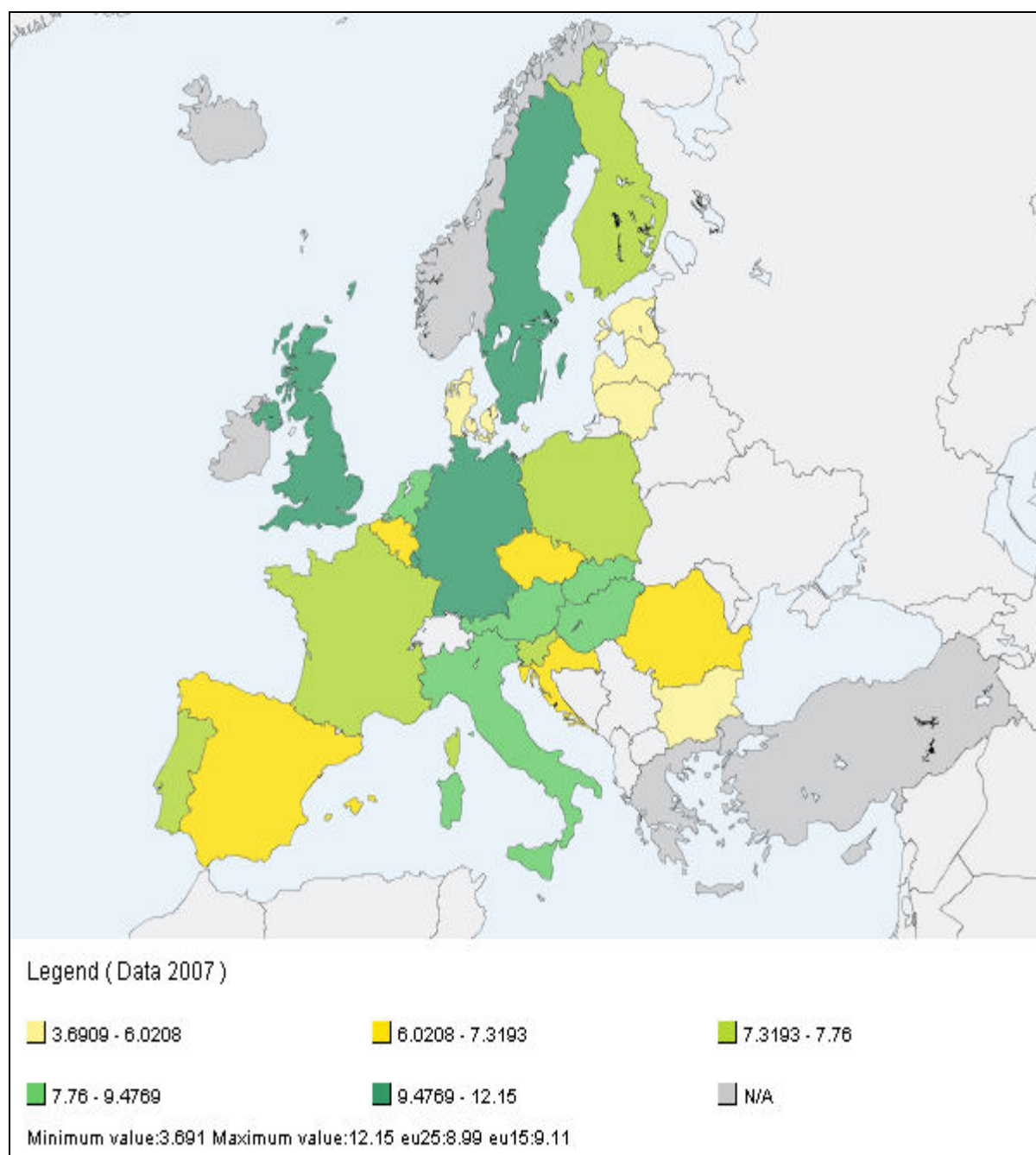
Figure 5: EU Gas Price 2004-2007 (Industrial Users)³⁷



Source: Eurostat - Euro per Gigajoule

³⁷ Natural gas prices charged to final industrial consumers, which are defined as follows: annual consumption of 41 860 GJ, and load factor of 200 days (1 600 hours). Prices are given in Euro (without taxes) per GJ corresponding to prices applicable on 1 January each year.

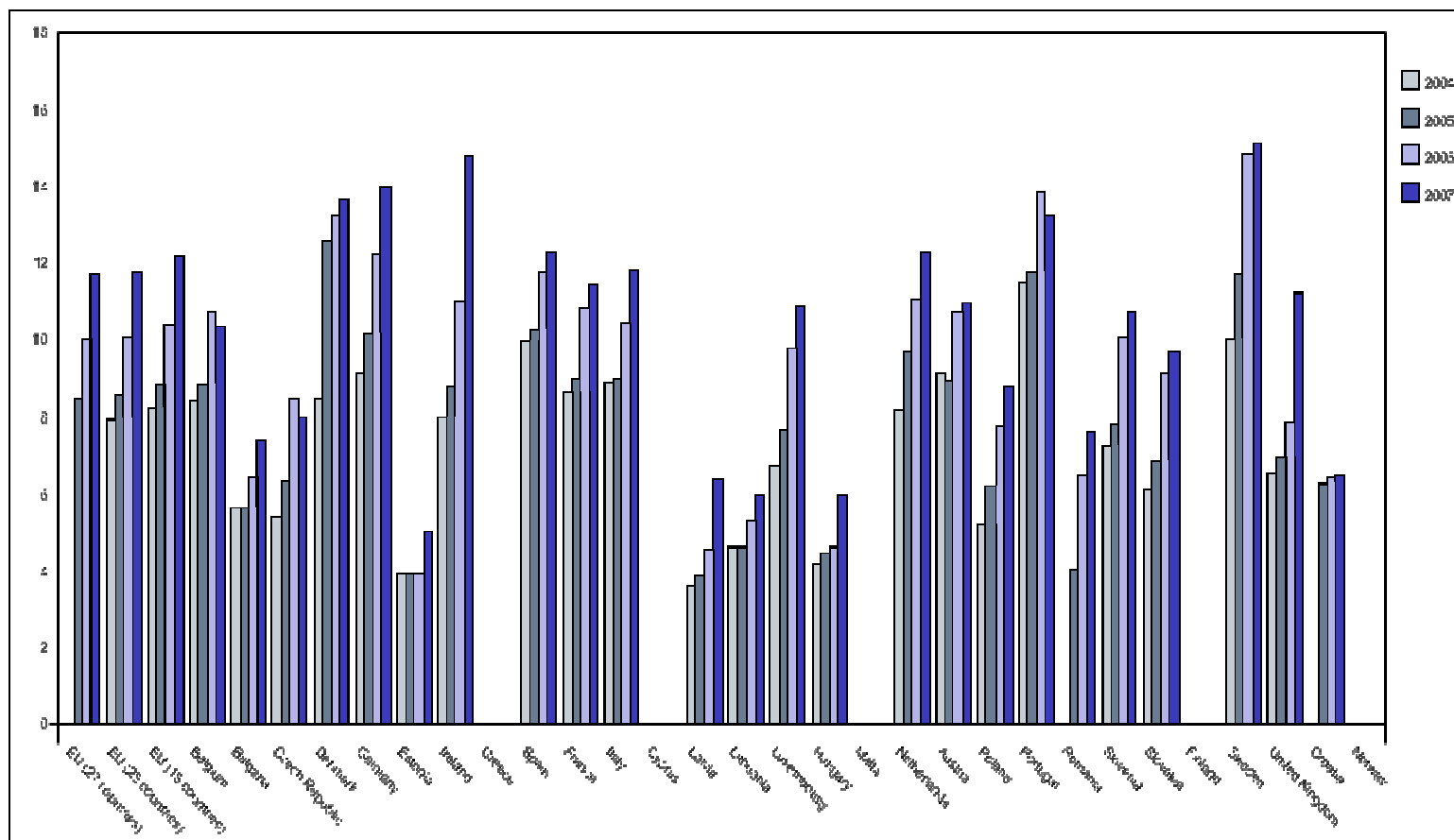
Figure 6: Gas prices - industrial users - Euro per GJ – 2007³⁸



³⁸

Natural gas prices charged to final industrial consumers, which are defined as follows: annual consumption of 41 860 GJ, and load factor of 200 days (1 600 hours). Prices are given in Euro (without taxes) per GJ corresponding to prices applicable on 1 January each year.

Figure 7: EU Gas Price 2004-2007 (Household Users)³⁹



Source: Eurostat - Euro per Gigajoule

³⁹ Natural gas prices charged to final domestic consumers, which is defined as follows: annual consumption of 83.7 GJ (equipment: cooking, water heating and central heating). Prices are given in Euro (without taxes) per GJ corresponding to prices applicable on 1st January each year.

6. NETWORK ACCESS

Table 11: Network Access Electricity 2006⁴⁰

	Number of transmission companies	Number of distribution companies	Approx network tariff large users €/MWh ⁴¹	Approx network tariff low voltage commercial €/MWh ⁴²	Approx network tariff low voltage household €/MWh ⁴³
Austria	3 [3]	130 [130]	10,1 [12,8]	48,7 [66,1]	55,7 [57,6]
Belgium	NA [2005: 1]	NA [2005:26]	NA [2005:11]	NA [2005:64]	NA [2005:51]
Bulgaria	NA	NA	NA	NA	NA
Cyprus	1 [1]	1 [1]	35,26 [35,26]	35,25 [35,25]	49,84 [49,84]
Czech Rep.	1 [1]	3 [3]	1,52 [1,57]	5,83 [6,61]	37,33 [39,96]
Denmark	1 [1]	110 [107]	12,1 [12,1]	26,8 [26,8]	44,3 [44,3]
Estonia	1 [1]	42 [41]	13,32 [13,32]	29 [29]	39,21 [39,21]
Finland	NA [2005:1]	NA [2005:90]	NA [2005:11,7]	NA [2005:28,2]	NA [2005:39]
France	1 [1]	148 [147]	12,6 [12,6]	40,2 [40,2]	41,9 [41,9]
Germany	4 [4]	876 [877]	16,5 [15,1]	63,8 [54,9]	73 [62,8]
Greece	1 [1]	1 [1]	3,38	20,35	NA
Hungary	1 [1]	6 [6]	8,30 [9,03]	50,03 [57,49]	33,67 [39,03]
Ireland	1 [1]	1 [1]	NA	NA	NA
Italy	9	169	13,7	48,83	79,7

⁴⁰ Network charges including system operation costs, commercial and billing costs related to network, congestion management cost, excluding taxes.

⁴¹ Standard customer Ig = annual consumption of 24000 MWh and maximum demand of 4000 kW.

⁴² Standard customer Ib = annual consumption of 50 MWh and maximum demand of 50 kW.

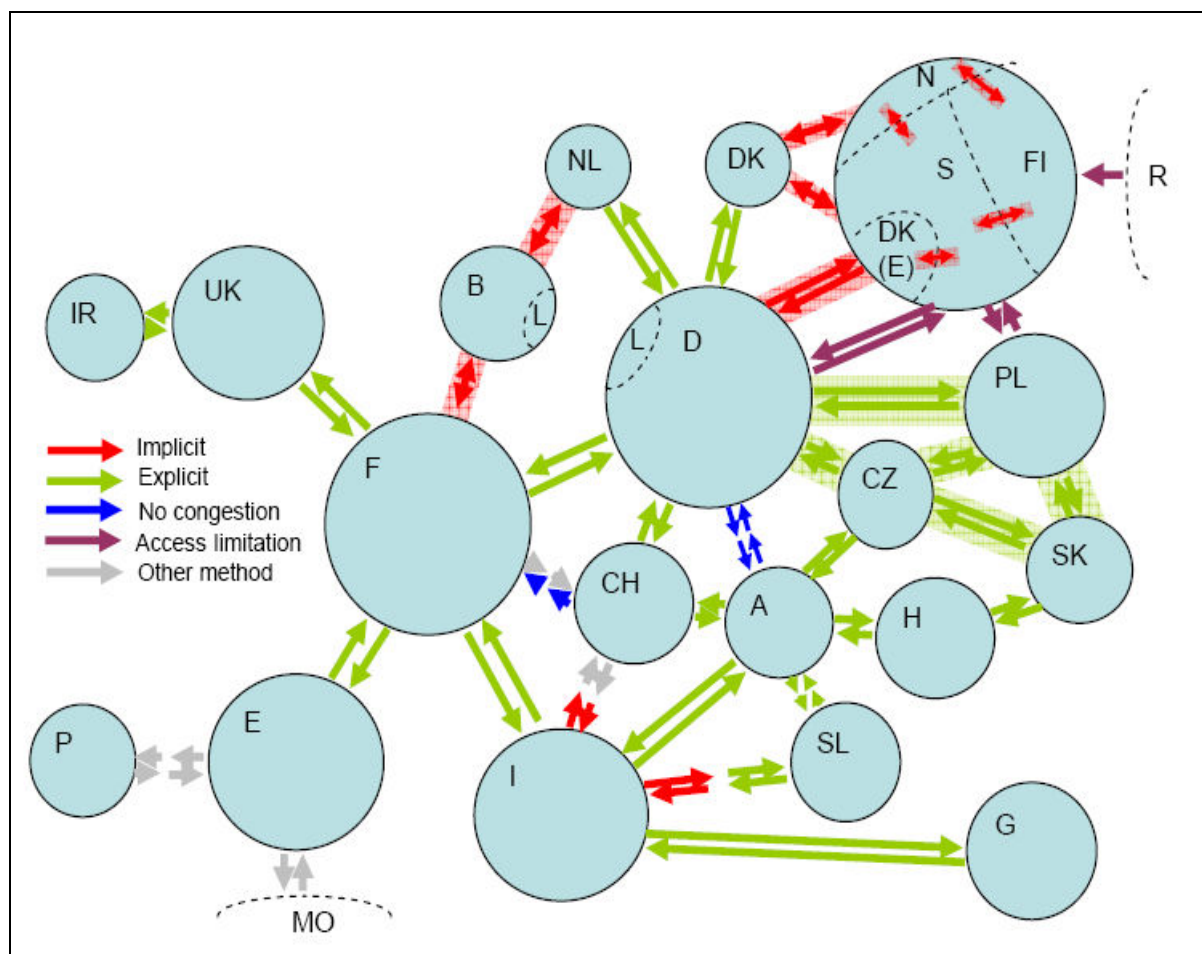
⁴³ Standard customer Dc = annual consumption of 3500 kWh of which 1300 by night.

Latvia	NA [2005:1]	NA [2005:9]	NA [2005:2,8]	NA [2005:18]	NA [2005:30]
Lithuania	1 [1]	2 [2]	25,05	53,58	53,58
Luxembourg	2 [2]	10 [10]	7,61 [7,68]	37,97 [28,96]	74,76 [73,76]
Malta	NA	NA	NA	NA	NA
Netherlands	1 [1]	9 [9]	NA	NA	NA
Norway	1 [1]	155 [155]	12,6	28,1	71,4
Poland	1 [1]	15 [15]	19,98 [17,35]	72,14 [67,86]	43,45 [42,33]
Portugal	3 [3]	13 [13]	4 [4]	37,6	28,5 [28,5]
Romania	1 [1]	25 [27]	20,89	65,38	65,38
Slovakia	1 [1]	3 [3]	38,6 [42]	41,5	38,6 [42]
Slovenia	1 [1]	5 [1]	8,71	45,73	47,83
Spain	1 [1]	326 [326]	7,3	22,3	34,5
Sweden	1 [1]	175 [175]	10,21	37,66	44,92
UK	1 [1]	18 [18]	NA	NA	31,51 [33,26]

Source: Regulators data

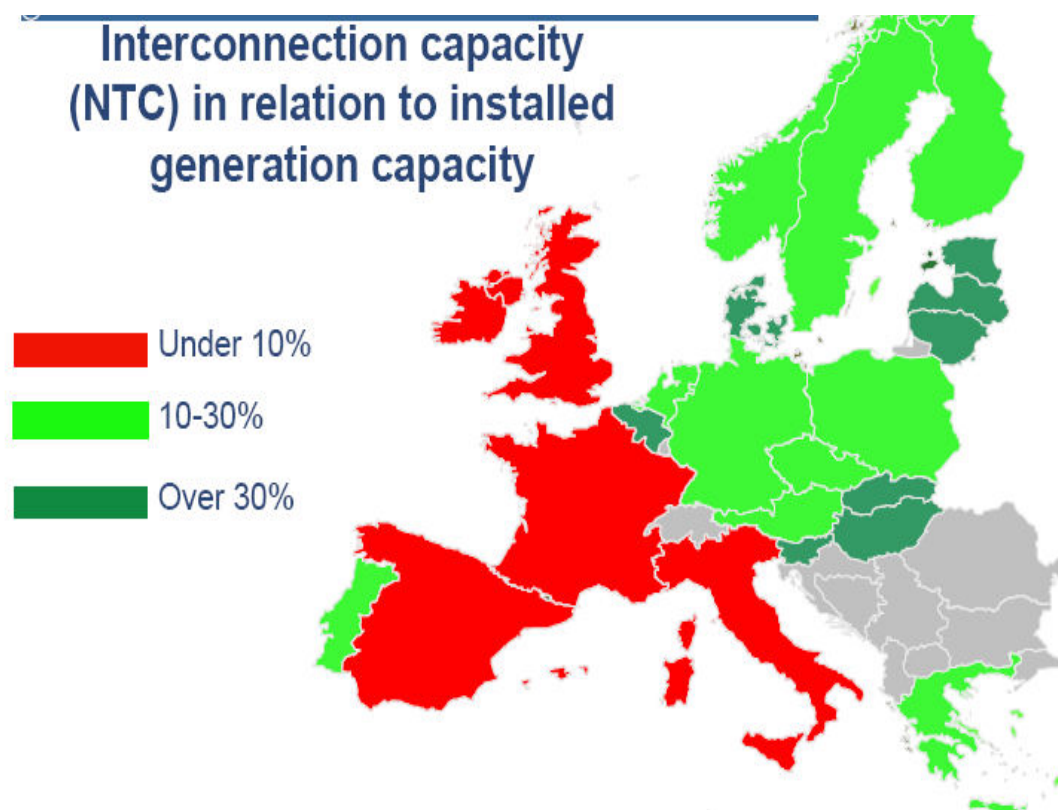
Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 12: Day - ahead transmission capacity allocation - June 2007



Source: ERGEG Monitoring Report – Compliance with Regulation 1228/2003, July 2007

Table 13: Interconnection capacity (NTC) in relation to installed generation capacity



Source: ERGEG 2007

Table 14: Network Access Gas 2006⁴⁴

	Number of transmission companies	Number of distribution companies	Approx network tariff large users €/m ³ ⁴⁵	Approx network tariff medium commercial €/m ³ ⁴⁶	Approx network tariff small commercial/ household €/m ³ ⁴⁷
Austria	7 [7]	19 [19]	NA [NA]	0,0998 [0,964]	0,1482 [0,1437]
Belgium	NA [2005:1]	NA [2005:18]	NA [2005:0,022]	NA [2005:0,068]	NA [2005:0,128]
Bulgaria	NA	NA	NA	NA	NA
Cyprus	NAP	NAP	NAP [NAP]	NAP	NAP
Czech Rep.	1 [1]	113 [102]	0,02319	0,04752	0,0558
Denmark	1 [1]	4 [4]	NA [NA]	0,13 [0,13]	0,13 [0,13°]
Estonia	1 [1]	31 [31]	0,014 [0,014]	1,014 [0,014]	0,049 [0,049]
Finland	1 [1]	32 [32]	0,068 [0,068]	NA	NA
France	2 [2]	23 [23]	0,011 [0,011]	0,102 [0,102]	0,153 [0,153]
Germany	5 [22]	734 [719]	0,029 [0,016]	0,10 [0,091]	0,132 [0,117]
Greece	1 [1]	4 [4]	0,0475 [0,0429]	NA [0,1496]	NA [0,157]
Hungary	1 [1]	11 [11]	0,034 [0,037]	0,071 [0,077]	0,077 [0,084]
Ireland	1 [1]	1 [1]	NA	NA	NA
Italy	2	360	0,0175	0,0833	0,1112

⁴⁴ Network tariff including metering costs excluding levies and taxes.

⁴⁵ Standard customer I4 = annual consumption of 418,6 TJ.

⁴⁶ Standard customer I1 = annual consumption of 0,418 TJ.

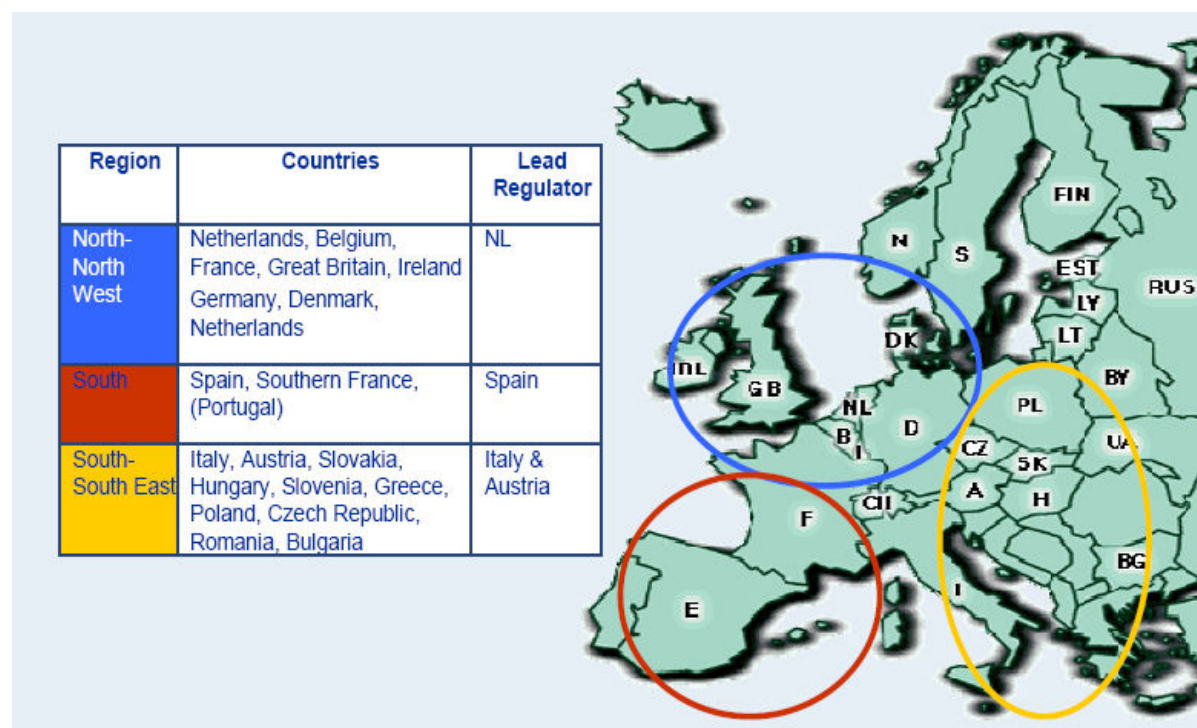
⁴⁷ Standard customer D3 = annual consumption of 83,7 GJ.

Latvia	NA [2005:1]	NA [2005:1]	NA [2005:1,38]	NA [2005:1,90]	NA [2005:1,90]
Lithuania	1 [1]	6 [6]	0,04 [0,04]	0,06 [0,06]	0,06 [0,06]
Luxembourg	1 [1]	4 [0]	0,015 [0,014]	0,061 [0,052]	0,096 [0,096]
Malta	NA	NAP	NAP	NAP	NAP
Netherlands	1 [1]	11 [11]	NA	NA	0,057
Norway	NAP	NAP	NAP	NAP	NAP
Poland	1 [1]	6 [7]	0,0435 [0,0438]	0,1138 [0,1149]	0,1130 [0,1142]
Portugal	1 [1]	11 [11]	NA	NA [NA]	NA
Romania	1 [1]	33 [34]	0,04364	0,05190	0,05452
Slovakia	1 [1]	42 [42]	0,044 [0,048]	0,059 [0,07]	0,0817 [0,0959]
Slovenia	1 [1]	17 [17]	0,0203	NA [NA]	0,14
Spain	8	22	0,030	0,131	0,253
Sweden	2 [2]	7 [7]	NAP	NA	NA
UK	1 [1]	8 [8]	NA	NA	0,079

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 15: Regional Initiatives driven by ERGEG - Gas Regions



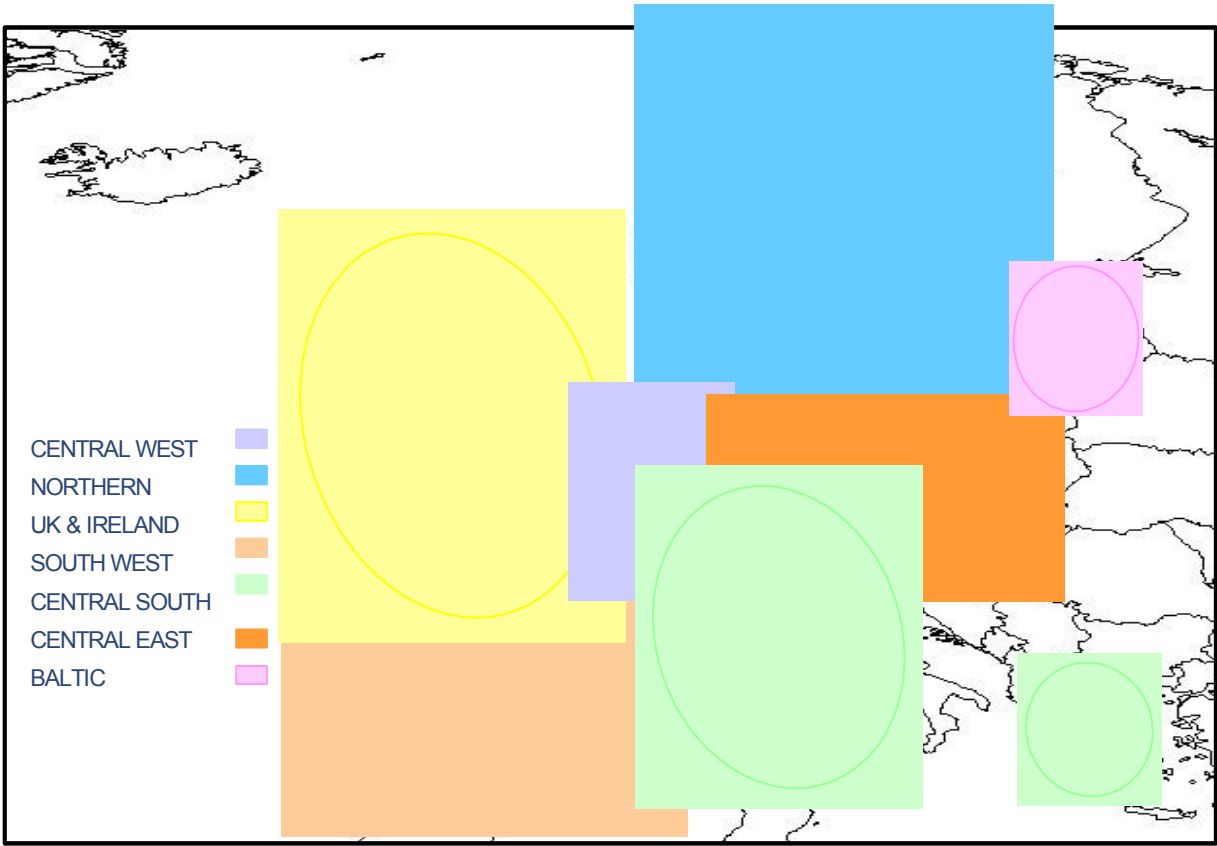
Source: ERGEG

Regions Gas (total 3)

1. South: chaired by Spain; members Spain, Portugal, France
2. South South East: co- chaired by Austria and Italy; members Austria, Czech Republic, Greece, Hungary, Italy, Poland, Slovakia, Slovenia, (Romania and Bulgaria have been invited to join)
3. North/North West: chaired by the Netherlands; members Netherlands, Belgium, France, Ireland, UK, Germany, Denmark, Sweden, Northern Ireland, Poland (aspirant member).

Table 16: Regional Initiatives driven by ERGEG - Electricity Regions

Source: ERGEG



7. UNBUNDLING

Table 17: Unbundling Electricity 2006

	Number of TSOs	Number of ownership unbundled TSOs	Number of DSOs	Number of legally unbundled DSOs	Number of DSOs < 100.000 customers (100.000 customers exemption applied)
Austria	3 [3]	0 [0]	130 [130]	11 [11]	119 [119] (Y)
Belgium	NA [2005:1]	0 [0]	NA [2005:26]	NA [2005:26]	13 [13] N
Bulgaria	NA	0 [0]	NA	NA	NA
Cyprus	1 [1]	0 [0]	1 [1]	0 [0]	0 [0] (Y)
Czech Republic	1 [1]	1 [1]	3 [3]	3 [3]	279 [275] (Y)
Denmark	1 [1]	1 [1]	107 [107]	110 [107]	103 [100] (N)
Estonia	1 [1]	0 [0]	42 [42]	1 [1]	41 [40] (Y)
Finland	NA [2005:1]		NA [2005:90]	NA [2005: 28]	NA
France	1 [1]	0 [0]	148 [147]	0 [4]	143 [143] (Y)
Germany	4 [4]	0 [0]	876 [877]	NA	799 [799] (Y)
Greece	1 [1]	0 [0]	1 [1]	0 [0]	0 [0] (N)
Hungary	1 [1]	0 [0]	6 [6] ⁴⁸	0 [0]	0 [0] (N)
Ireland	1 [1]	0 [0]	1 [1]	0 [0]	0 [0] (N)
Italy	9	1	169	NA	157 (N)
Latvia	NA [2005:1]	NA [2005:1]	NA [2005:9]	NA [2005:8]	8 [8] (Y)

⁴⁸ Legally 6 DSOs but 3 ownership groups.

Lithuania	1 [1]	1 [1]	2 [2]	2 (2)	5 [5] (Y)
LUX	2 [2]	0 [0]	10 [10]	2 [2]	9 [9] (Y)
Malta	NA	0 [0]	NA	NA	NA
NL	1 [1]	1 [1]	9 [9]	9 [9]	5 [5] (Y)
Norway	1 [1]	1 [1]	155 [155]	50 [50]	149 [149] (Y)
Poland	1 [1]	0 [1]	15 [15]	0 [15]	1 [1] (Y)
Portugal	3 [3]	1 [1]	13 [13]	11 [11]	10 [10] (Y)
Romania	1 [1]	1 [1]	25 [27]	0 [7]	17 [19] (Y)
Slovakia	1 [1]	1 [1]	3 [3]	0 [3]	140 (N)
Slovenia	1 [1]	1 [1]	5 [1]	0 [1]	1 [0] (N)
Spain	1 [1]	1 [1]	326 [326]	326 [326]	320 [320] (Y)
Sweden	1 [1]	1 [1]	175 [175]	175 [175]	169 [169] (Y)
United Kingdom	1 [1]	1 [1]	18 [18]	18 [18]	4 [4] (N)

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 18: Unbundling Gas 2006

	Number of TSOS	Number of ownership unbundled TSOs	Number of DSOs	Number of legally unbundled DSOs	Number of DSOs < 100.000 customers (100.000 customers exemption applied 2007)
Austria	7 [7]	0 [0]	19 [19]	8 [8]	14 [14] (Y)
Belgium	NA [2005:1]	0 [0]	NA [2005:18]	NA [2005:18]	NA [2005:9] (N)
Bulgaria	NA	0 [0]	NA	NA	NA
Cyprus	NAP	NAP	NAP	NAP	NAP
Czech Republic	1 [1]	0 [0]	113 [102]	0 [8]	105 [94] (Y)
Denmark	1 [1]	1 [1]	4 [4]	4 [4]	2 [1] (N)
Estonia	1 [1]	0 [0]	31 [31]	1 [1]	31 [31] (Y)
Finland	1 [1]	0 [0]	32 [32]	1 [1]	32 [32] (Y)
France	2 [2]	0 [0]	23 [23]	0 [0]	20 [20] (Y)
Germany	5 [22]	0 [0]	734 [719]	NA	708 [694] (Y)
Greece	1 [1]	0 [0]	4 [4]	0 [0]	NA (N)
Hungary	1 [1]	1 [1]	11 [11]	0 [2]	6 [6] (Y)
Ireland	1 [1]	0 [0]	1 [1]	0 [0]	0 [0] (N)
Italy	2	1	360	234	267 (N)
Latvia	NA [2005:1]	0 [0]	NA [2005:1]	NA [2005:0]	NA [2005:0] (N)
Lithuania	1 [1]	0 [0]	6 [6]	1 [0]	6 [5] (Y)
LUX	1 [1]	0 [0]	4 [0]	0 [0]	4 [4] (Y)
Malta	NAP	NAP	NAP	NAP	NAP

NL	1 [1]	1 [1]	11 [11]	11 [11]	7 [7] (Y)
Norway	NA	NA	NA	NA	NAP
Poland	1 [1]	1 [1]	6 [7]	0 [6]	0 [1] (N)
Portugal	1 [1]	1 [1]	11 [11]	11 [11]	7 [7] (Y)
Romania	1 [1]	1 [1]	33 [34]	33 [34]	31 [32] (Y)
Slovakia	1 [1]	0 [0]	42 [42]	1 [1]	41 [41] (N)
Slovenia	1 [1]	0 [0]	17 [17]	0 [0]	17 [17] (Y)
Spain	8	1	22	22	16 (N)
Sweden	2 [2]	1 [1]	7 [7]	7 [7]	7 [7] (Y)
United Kingdom	1 [1]	1 [1]	8 [8]	5 [5]	0 [0] (N)

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

8. SUPPLY – DEMAND BALANCE

Table 19: Electricity Security of Supply 2006-2007

MW	Peak demand recorded	winter/ summer peak	Maximum net generating capacity
	GW ⁴⁹		GW ⁵⁰
Austria	9,481 [8,733]	W	19,182
Belgium	NA [2005:13,73]	W	NA [2005: 15,68]
Bulgaria	NA	W	NA
Cyprus	0,907 [1,0066]	S	1,118 [1,129]
Czech R	11,40 [10,549]	W	17,5 [17,5]
Denmark	NA [2006: 6,4]	W	12,5 [12,7]
Estonia	1550 [1537]	W	2,059 [2,050]
Finland	NA [2005:13,5]	W	NA
France	86,3 [86,3]	W	116 [116]

⁴⁹ The highest simultaneous demand for electricity satisfied during the year. The electricity supply at the time of peak demand may include demand satisfied by imported electricity or alternatively the demand may include exports of electricity. The total peak load on the national grid is not the sum of the peak loads during the year on every power station as they may occur at different times.

⁵⁰ IEA definition: the national Maximum Generating Capacity is defined as the sum of all individual plants' maximum net capacity available during a period of at least 15 hours per day. The reported figures should relate to the maximum net capacities on 31 December. Net capacity is without auxiliary services.

Germany	77,8	W	139,5
Greece	9,961	S	11,645
Hungary	6,449	W	6,625
Ireland	5 [5]	W	5,8 [5,8]
Italy	55,6	S	79,6
Latvia	NA [2005: 1,272]	W	NA [2005: 2,684]
Lithuania	2,09	W	2,79
Luxembourg	1,053	W	0,557
Malta	NA	S	NA
Netherlands	14,8	W	21 [21]
Norway	21,575 [21,45]	W	29,267
Poland	24,6	W	35,7
Portugal	8,8 [8,8]	W	13,6 [13,6]
Romania	8,151 [8,435]	W	15,501
Slovakia	4423	W	8127 [7727]
Slovenia	2,076	W	2,991

Spain	42,15	S	83,04
Sweden	26,3 [26,2]	W	33,8
UK	61,3 [61,3]	W	78,4 [78,4]

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 20: Gas Security of Supply

	Gross Inland Consumption 2006 ⁵¹ (Gm3)	Peak 2006 ⁵² (Mm3/d)	Import capacity total 2006 (Gm3/y)	Unreserved capacity (Gm3/y) ⁵³
Austria	8,46	NA	36,7	0
Belgium	NA [2005: 17,1]	NA [2005:3,1]	NA [2005:120,4]	NA [2005:4,3]
Bulgaria	NA	NA	NA	NA
Cyprus	NAP	NAP	NAP	NAP
Czech R	9,27	67,6 [49,3]	66	11
Denmark	4,1	21 [20]	1,5	0,3
Estonia	1,008	6,7 [6,35]	1,008	NA
Finland	4,5	19,7 [19,7]	6,9	NA
France	46,77	51,7 [46,64]	70,64	10,9
Germany	105,2	NA	266,87	NA
Greece	3,12	NA	3,2	NA

⁵¹ Gross Inland Consumption = Production + Imports - Exports + Storage variations.

⁵² Maximum quantity of gas consumed in a day during the year.

⁵³ Open to short term transport. Capacity not reserved for transit or domestic long term contracts (> 1 year).

Hungary	14,742	89,1	19,7	4,57
Ireland	NA	NA	NA	NA
Italy	84,5	443	94,1	19,1
Latvia	NA [2005:1,66]	NA [2005:10000]	NA [2005:2,5]	NA [2005:0]
Lithuania	3,10	21,9	11,8	5,76
Luxembourg	1,407	NA	4	4
Malta	NA	NA	NA	NA
Netherlands	45	NA	NA	NA
Norway	NA	NA	NA	NA
Poland	13,9	67,5 [54]	43,2	5,23
Portugal	3,86	16,4 [16,4]	8,95	4,7
Romania	17,2	71,5	5,1	NA
Slovakia	6,2	42 [30]	73700	NA
Slovenia	1,101	4,96	2,78	NA
Spain	33,8	148,3	63,6	7,632
Sweden	0,919	NA	1,5	NA
UK	98	413 [436]	35	NA

Source: Regulators data

Data in brackets [] indicating most recent 2007 data, where available, unless reference to 2005 data is explicitly indicated.

Table 21: 2006 Primary Energy Consumption⁵⁴

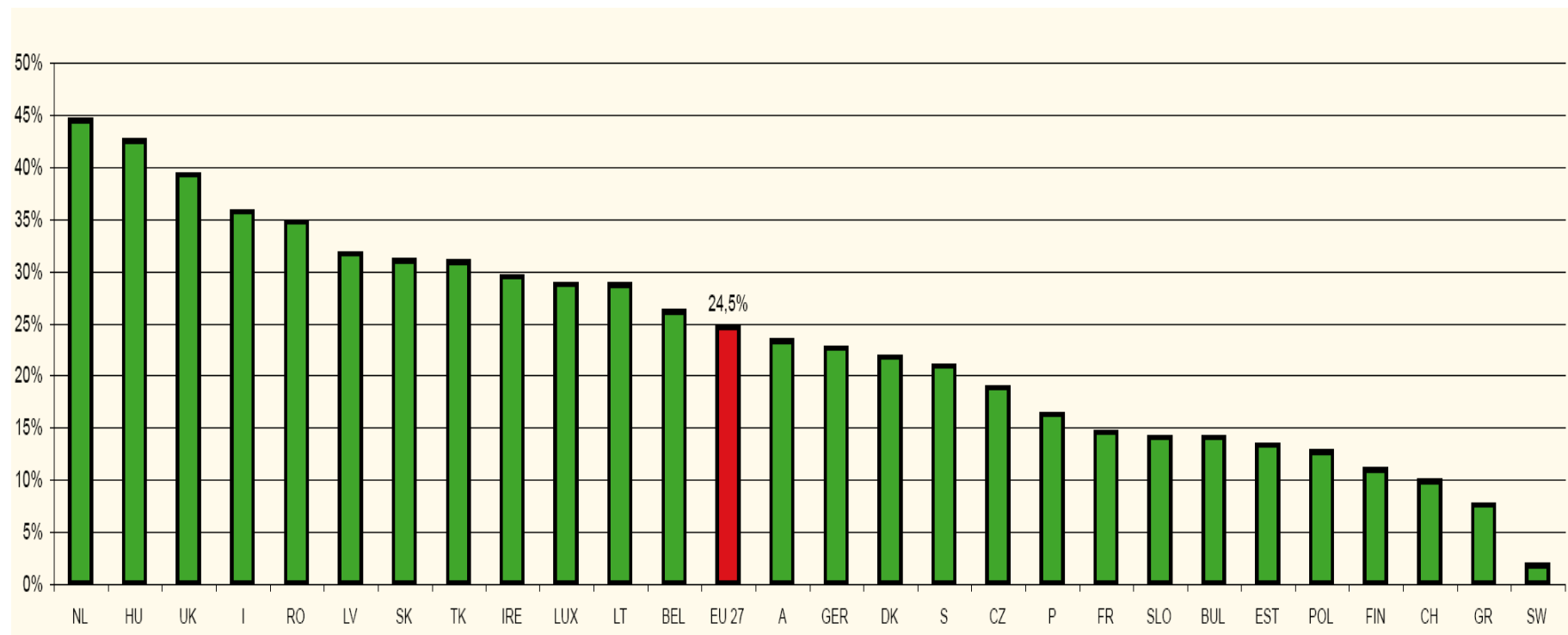
MTDE	Oil	Solid Fossil Fuels	Natural Gas	Nuclear Electricity	Hydro Electricity	Electricity Net Import	Renewables	Others	Total
AUSTRIA	14,29	3,58	7,79	0,00	2,96	0,60	4,35	0,00	33,57
BELGIUM	21,71	5,17	14,61	12,15	0,00	0,94	1,47	0,00	56,05
BULGARIA	4,93	6,94	2,80	4,90	0,40	-0,60	0,00	0,70	20,07
CZECH REPUBLIC	9,21	21,76	8,37	6,79	0,28	-1,09	0,18	-0,82	44,68
DENMARK	8,26	5,54	4,56	0,00	0,00	-0,60	3,07	0,21	21,05
ESTONIA	1,13	2,93	0,74	0,00	0,00	0,00	0,72	0,00	5,52
FINLAND	8,62	7,33	3,84	5,73	0,99	0,98	7,14	0,71	35,33
FRANCE	91,30	12,41	39,36	117,32	5,49	-5,45	12,80	0,00	273,23
GERMANY	123,30	82,40	78,50	43,60	1,80	-1,70	19,20	1,40	348,50
GREECE	17,60	9,10	2,30	0,00	1,20	0,00	0,00	0,70	30,90
HUNGARY	7,24	3,14	11,70	3,50	0,02	0,63	1,31	0,05	27,59
IRELAND	8,40	1,80	4,46	0,00	0,10	0,10	0,30	0,00	15,16
ITALY	84,74	17,37	69,70	0,00	3,70	9,84	10,25	0,00	195,60
LATVIA	1,40	1,50	1,57	0,00	0,50	0,00	0,00	0,00	4,97
LITHUANIA	2,69	0,27	2,46	2,43	0,00	0,00	0,75	0,00	8,60
LUXEMBOURG *	2,92	0,11	1,37	0,00	0,01	0,31	0,03	0,04	4,79
NETHERLANDS	29,00	8,00	34,10	0,90	0,00	1,80	0,30	2,80	76,90
POLAND	20,04	61,27	12,29	0,00	0,20	-0,94	0,00	4,84	97,70
PORTUGAL	15,40	6,30	4,50	0,00	0,90	0,60	0,10	0,00	27,80
ROMANIA	5,50	7,29	9,82	1,43	1,40	0,00	2,92	0,00	28,36
SLOVAKIA	3,55	4,20	5,93	4,62	0,39	-0,28	0,45	0,32	19,18
SLOVENIA	2,49	1,56	1,02	1,42	0,32	0,00	0,48	0,00	7,29
SPAIN	70,90	18,10	30,00	15,70	2,20	-0,30	7,70	0,00	144,30
SWEDEN	17,30	2,40	0,90	16,70	5,30	0,50	10,10	0,50	53,70
UNITED KINGDOM	77,00	45,70	90,90	17,10	0,60	0,60	0,20	0,00	232,10
EU 27	648,92	336,17	443,58	254,29	28,76	5,94	83,33	11,44	1812,93
SWITZERLAND	12,92	0,15	2,71	6,84	2,80	0,23	1,01	1,19	27,86
TURKEY	31,90	22,90	28,90	0,00	3,70	-0,10	6,60	0,00	93,90

Source: Eurogas

⁵⁴

Nuclear and hydro electricity are domestically produces. Renewables include biomass, wind, solar and geothermal energy.

Figure 8: Share of Natural Gas in Primary Energy Consumption 2006



Source: Eurogas

Table 22: Natural gas supplies 2006⁵⁵

PJ - GCV	Indige- nous Pro- duction	Total Net- Import EU	Total Net- Import non-EU	Changes in stock	Other balances	Total Net Supplies
AUSTRIA	73	-55,0	368,0	-30,0	-18,0	338,0
BELGIUM	0	216,4	471,7	-0,5	-2,1	685,5
BULGARIA	18	0,0	100,6	0,0	0,0	118,8
CZECH REPUBLIC	3	0,0	371,0	-22,2	0,0	351,7
DENMARK	390	-196,3	0,0	-4,1	1,2	191,2
ESTONIA	0	0,0	33,9	0,0	0,0	33,9
FINLAND	0	0,0	180,5	0,0	-0,1	180,3
FRANCE	45	304,7	1531,5	-41,7	-8,8	1830,7
GERMANY	659	340,0	2705,0	-60,0	-24,0	3620,0
GREECE	0	0,0	108,5	0,0	0,2	108,7
HUNGARY	111	42,0	396,0	-15,9	0,0	532,9
IRELAND	19	167,6	0,0	0,1	0,0	186,8
ITALY	418	346,0	2588,0	-134,0	0,0	3218,0
LATVIA	0	0,0	55,6	0,0	0,0	55,6
LITHUANIA	0	0,0	113,5	0,0	0,0	113,5
LUXEMBOURG *	0	54,7	0,0	0,0	0,0	54,7
NETHERLANDS	2578	-1415,6	437,9	0,0	0,0	1600,2
POLAND	169	17,1	377,2	-18,8	-6,6	537,8
PORTUGAL	0	-5,7	189,2	-7,9	-3,5	172,1
ROMANIA	277	0,0	118,0	0,0	-2,9	392,0
SLOVAKIA	3	-15,2	241,8	3,7	0,0	233,6
SLOVENIA	0	0,0	45,0	-1,3	0,9	44,6
SPAIN	3	0,0	1473,2	-22,4	-46,0	1407,7
SWEDEN	0	40,4	0,0	0,0	-0,2	40,2
UNITED KINGDOM	3349	-401,0	846,0	-23,0	-1,0	3770,0
EU 27	8115	-559,95	12757,99	-378,1	-111,0	19824,0
SWITZERLAND	0	121,9	3,9	0,0	0,0	125,8
TURKEY	32	0,0	1157,0	0,0	23,0	1212,0

⁵⁵ Changes in stocks: (-) injection, (+) withdrawal.

Source: Eurogas

Conversion factors

1 PJ (GCV) = 25,6 million m³ gas

1 m³ of natural gas = 39 mega joules (MJ – GCV) = 10,8 kWh

1 Mtoe = 1 million tones of oil equivalent = 41,86 PJ (NCV)

1000 m³ of natural gas = 0,9 ton oil equivante (toe – crude oil)

1 BCM = 1 billion cubic meters

1 cubic meter (m³) = 35,315 cubic feet (cf)

1 million m³ of LNG = 593 million m³ of gas

Net Caloric value (NCV) = 0,9 Gross calorific value (GCV)

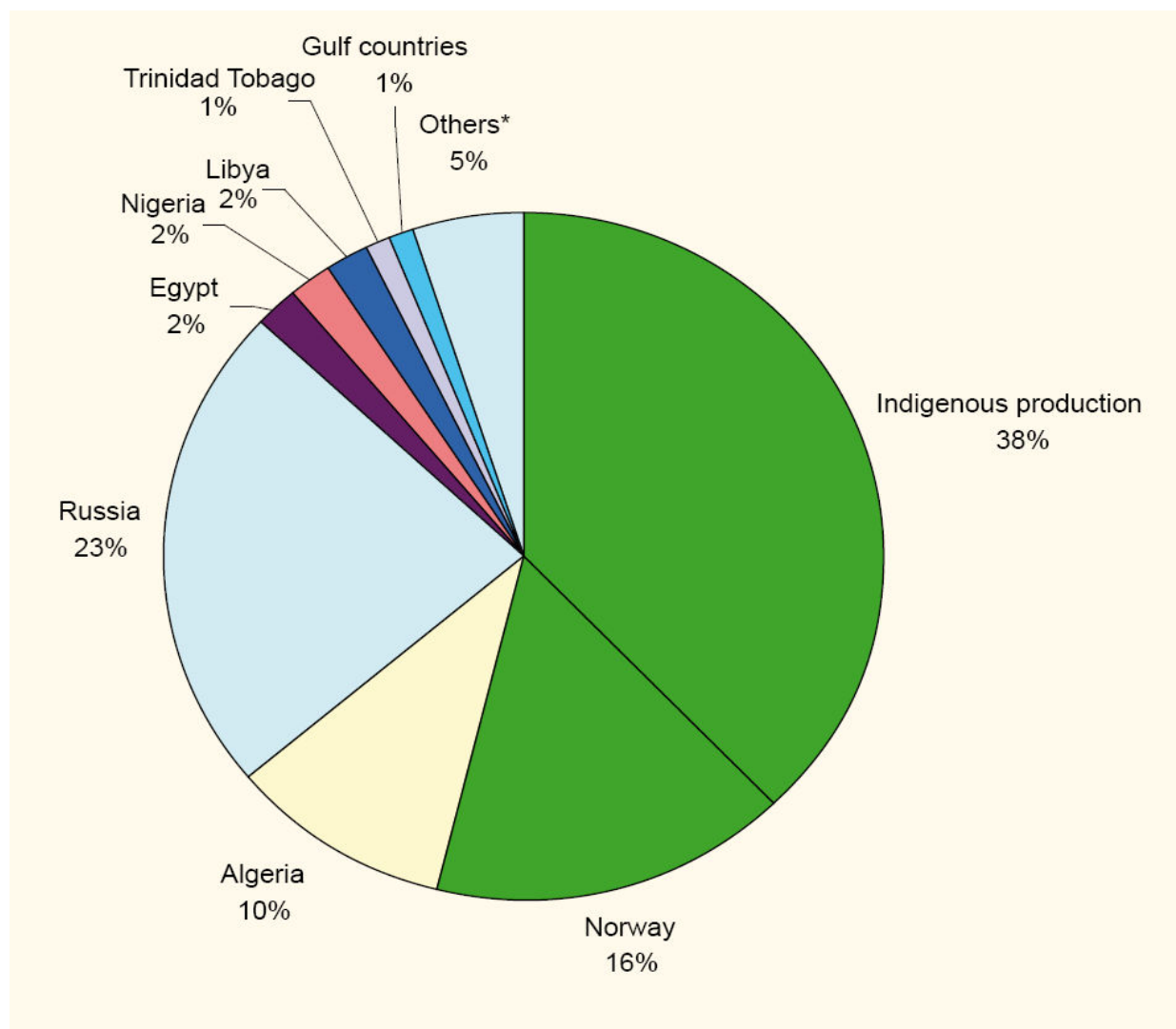
1 megajoule = 10⁶ joules (MJ)

1 gigajoule = 10⁹ joules (GJ)

1 terajoule = 10¹² joules (TJ)

1 petajoule = 10¹⁵ joules (PJ)

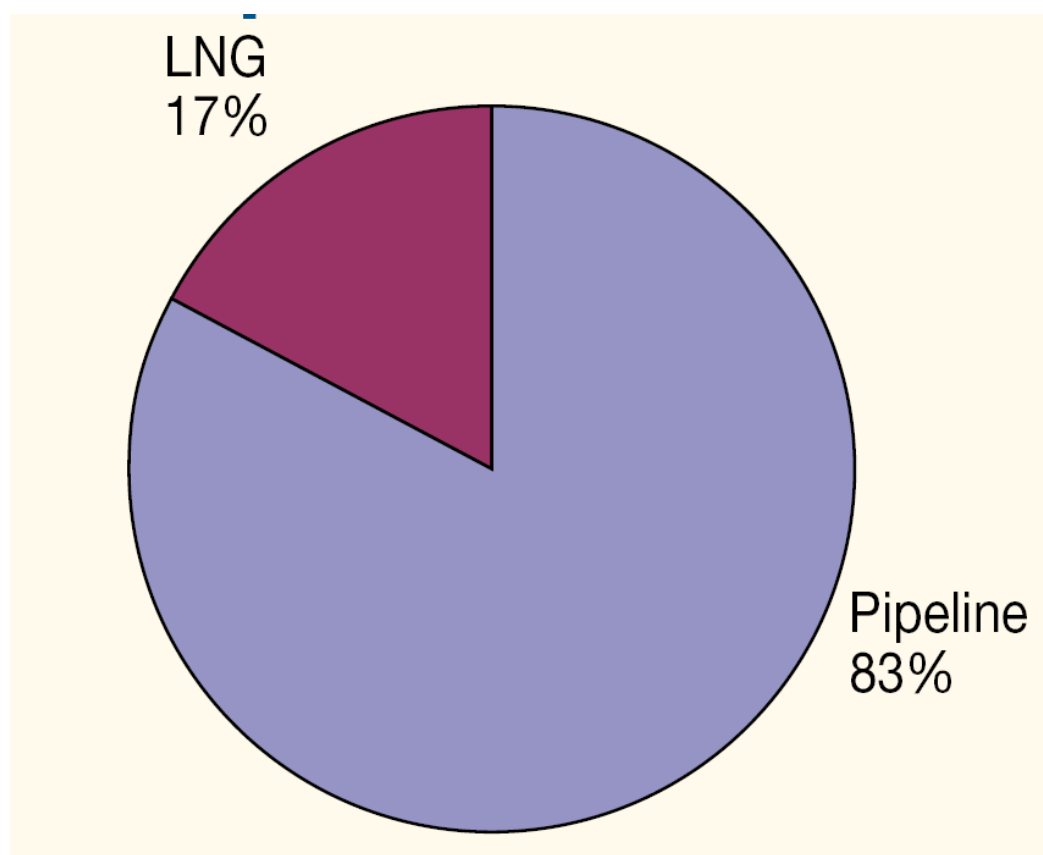
Figure 9: Breakdown of 2006 gas net supplies⁵⁶



Source: Eurogas

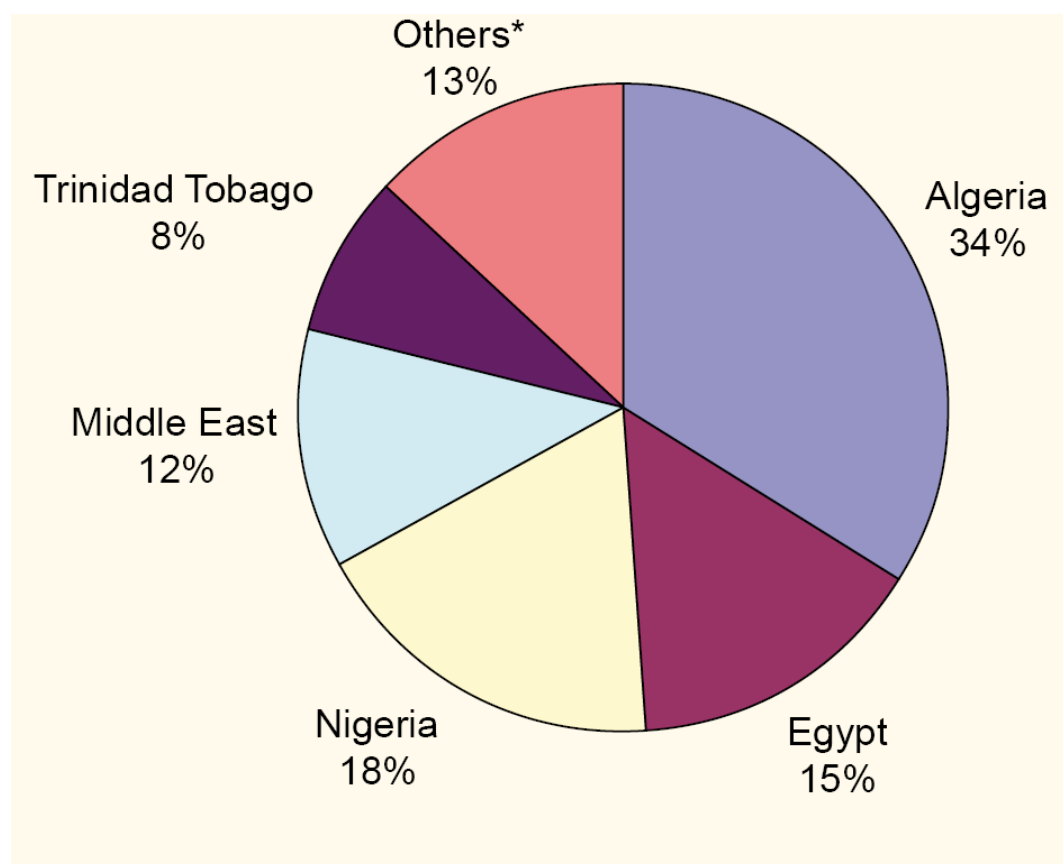
⁵⁶ Others including supplies from sources which can not be identified.

Figure 10: Net import from non-EU countries 2006



Source: Eurogas

Figure 11: Breakdown of 2006 LNG supplies⁵⁷



Source: Eurogas

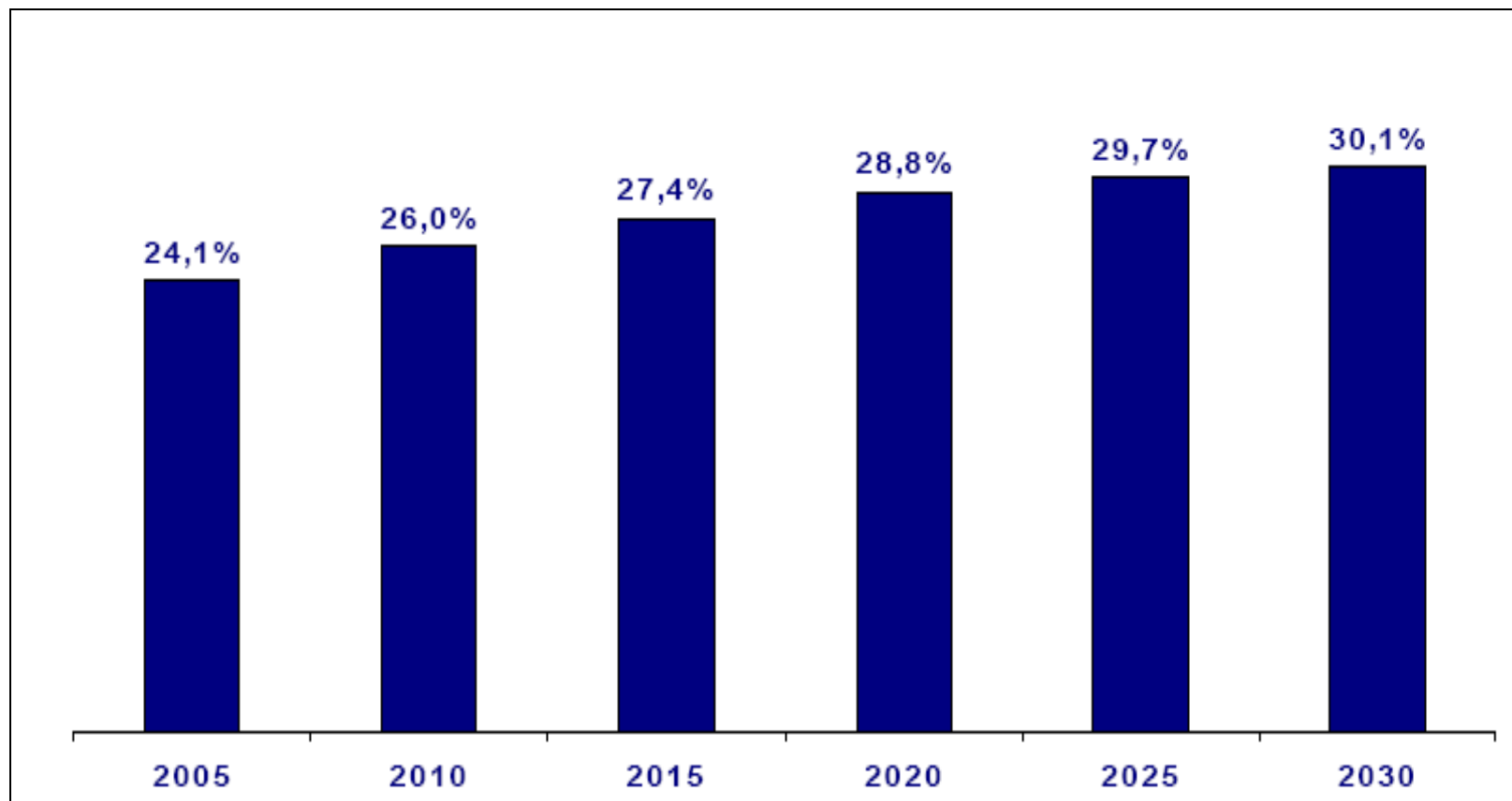
⁵⁷ Others including supplies from sources which can not be identified.

Table 23: Natural gas Storage - 1 January 2007

	Number of storage facilities	Maximum working volume*	Maximum withdrawal capacity**
AUSTRIA	4	2820	33
BELGIUM	2	779	46
BULGARIA	1	1000	8
CZECH REPUBLIC	9	3376	55
DENMARK	2	881	22
ESTONIA	0	0	0
FINLAND	0	0	0
FRANCE	15	11700	200
GERMANY	44	19138	463
GREECE	1	75	5
HUNGARY	5	3400	48
IRELAND	1	198	3
ITALY	10	13400	152
LATVIA	1	2325	25
LITHUANIA	0	0	0
LUXEMBOURG*	0	0	0
NETHERLANDS	3	3500	30
POLAND	7	1651	34
PORTUGAL	1	90	7
ROMANIA	6	2850	40
SLOVAKIA	3	2066	32
SLOVENIA	0	0	0
SPAIN	2	1659	12
SWEDEN	1	10	1
UNITED KINGDOM	9	4364	127
EU 27	127	75282	1341
SWITZERLAND	0	72	2
TURKEY	0	5	22

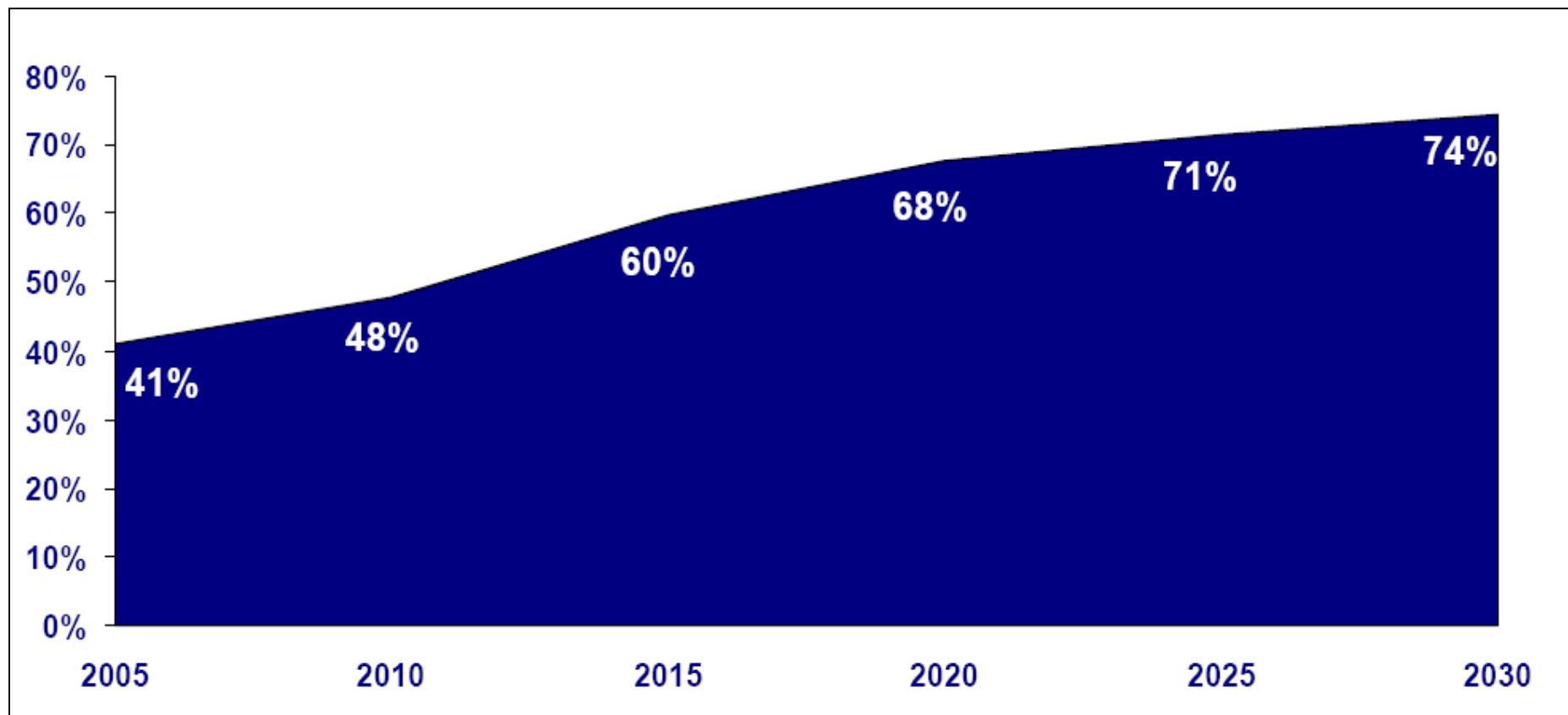
Source: Eurogas

Figure 12: Gas Demand Forecast 2030 - EU 27



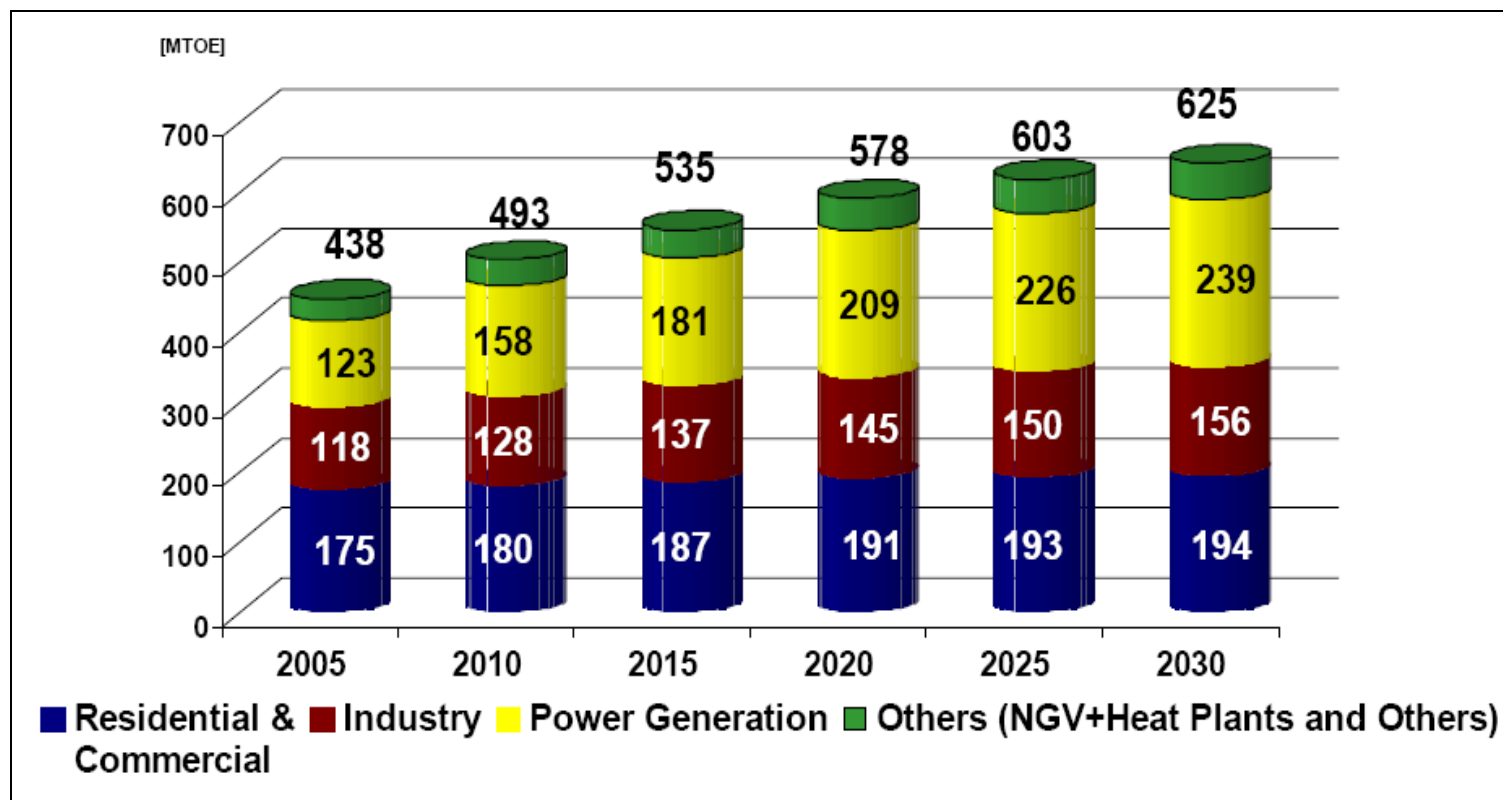
Source: Eurogas

Figure 13: Gas Import Dependency - EU 27



Source: Eurogas

Figure 14: EU 27 Gas Demand Forecast by Sector



Source: Eurogas